Submit a Concur Expense Report Prepared by the SSC

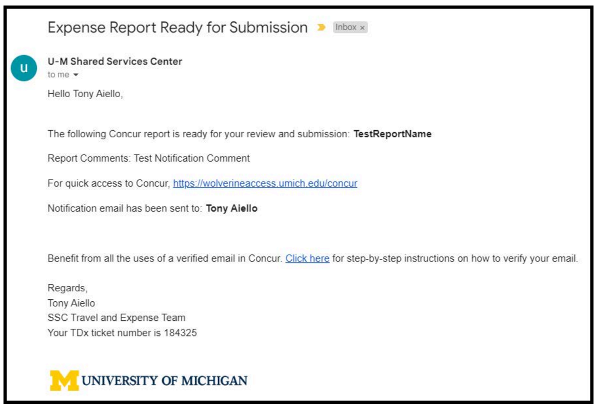
Navigation: *Wolverine Access→ Browse Categories→ Financial Services→ Expense Reporting (Concur)*
You will need to log-in with your uniqname and UMICH password

Description: This document describes how to submit an expense report that was prepared by the SSC to your approver. System notifications come from the sender *U-M Shared Services Center*

Access Concur

The **email** that you receive will contain a **link**, you may click that link and then enter your uniqname and UMICH password – or you may follow the **navigation** at the top of this document, to end up in the same place.

Please note: We recommend submitting Concur reports using a browser on your computer rather than a mobile device. There have been compatibility issues reported when submitting Concur reports through a mobile browser. This can cause a report to appear to the user that the report has been submitted when it has actually not been submitted in Concur.


Expense Report Ready for Submission Inbox ×

U-M Shared Services Center
to me

Hello Tony Aiello,

The following Concur report is ready for your review and submission: **TestReportName**

Report Comments: Test Notification Comment

For quick access to Concur, https://wolverineaccess.umich.edu/concur

Notification email has been sent to: **Tony Aiello**

Benefit from all the uses of a verified email in Concur. Click here for step-by-step instructions on how to verify your email.

Regards,
Tony Aiello
SSC Travel and Expense Team
Your TDx ticket number is 184325

UNIVERSITY OF MICHIGAN

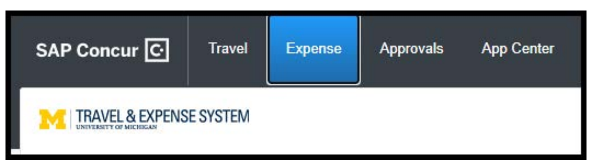
At left is an example of the System-generated email that you will receive from U-M Shared Service Center

You will notice the **Report Name** is listed, as well as the **link** to login to the Concur Travel & Expense System

Concur – The Expense Pane

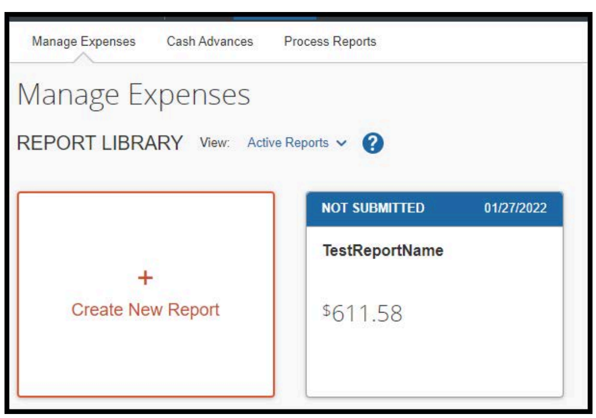
Once logged in to **Concur**:

- **Click** on the **Expense** tab



Once in the **Expense Tab**:

- Under **Report Library**, your active reports will be listed
- Notice the medium-blue border around the report at right, and the text ***"Not Submitted"*** at the top
- **Double-check** that you are submitting the correct expense report *(in the event that you have more than one that are unsubmitted)*



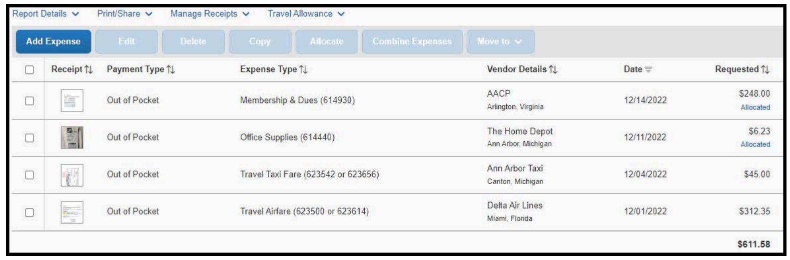
Method 1: Review Expense Report Line(s) by Clicking on the Individual Line

- **Verify** that the Shortcode(s) is appropriate for the expense(s) (**Allocations**)
- **Review** any line **Comment** *(ie: explanations of out-of-policy transactions, additional transaction details, et al.)*

Verify the following totals, as appropriate:

- **Personal Expenses** *(not eligible for reimbursement or payment by U-M)*
- **Amount Due Employee** *(reimbursement)*
- **Amount Due Company Card** *(P-Card expenses)*
- **Total Paid By Employee** *(amount you owe to the U-M, to be deducted from your next paycheck)*

Example of expense line items in an expense report:



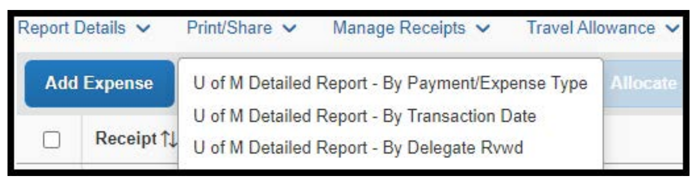
	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
		Out of Pocket	Membership & Dues (614930)	AACP Arlington, Virginia	12/14/2022	$248.00 Allocated
		Out of Pocket	Office Supplies (614440)	The Home Depot Ann Arbor, Michigan	12/11/2022	$6.23 Allocated
		Out of Pocket	Travel Taxi Fare (623542 or 623656)	Ann Arbor Taxi Canton, Michigan	12/04/2022	$45.00
		Out of Pocket	Travel Airfare (623500 or 623614)	Delta Air Lines Miami, Florida	12/01/2022	$312.35
						$611.58

Reply to the notification email that you received to request additional edits, if they are needed

Method 2: Review Expense Report by Viewing the UM Detailed Report

For this method, click on the ***Print/Share*** link, and select any of the **U of M Detailed Reports**:

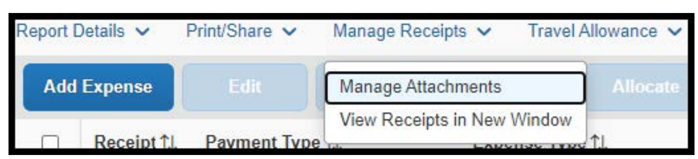
- **By Payment/Expense type**
- **By Transaction Type**
- **By Delegate Rvwd**



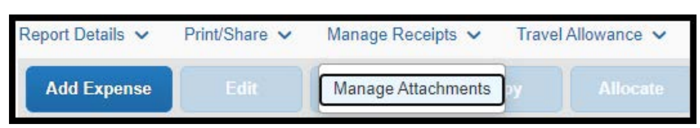
Review Required Receipts

Verify that delegates or SSC staff have attached all of the required receipts to the report

- From the **Manage Receipts** hyperlink, select **View Receipts in a New Window**



You will also need to view the receipts attached to each **line item**. *If **no receipts** are attached, the View option does not appear, as illustrated at right*



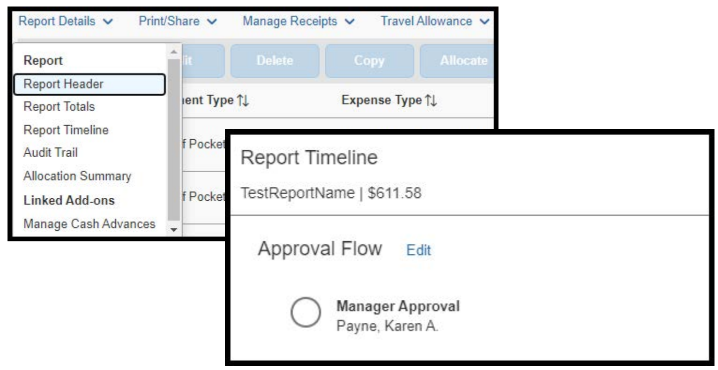
- **Verify** that receipt images are **applicable** to the individual line items – and are **legible**
- **Click Close** to exit the window, when completed

If a receipt image is inaccurate or illegible, email the Shared Services Center at ExpenseReports@umich.edu with accurate and/or legible receipts

Approvers & Adding Additional Approvers

Some departments and/or certain expenses may require **additional approvers** to be added to an expense report - to add/subtract/change the approvers:

- From the **Report Details** hyperlink, select **Report Timeline**
- Then click **Edit** in the **Approval Flow** section

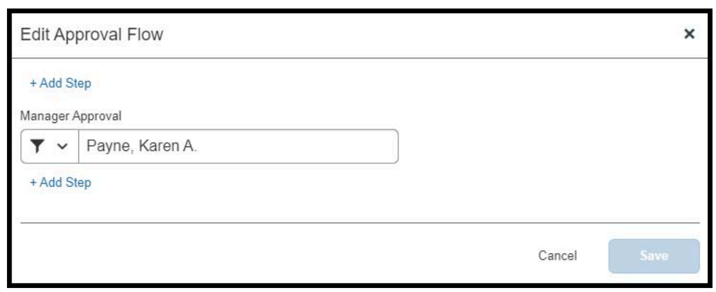


To add an approver **AFTER** the listed Manager Approval

- Click **+Add Step** below the listed approver

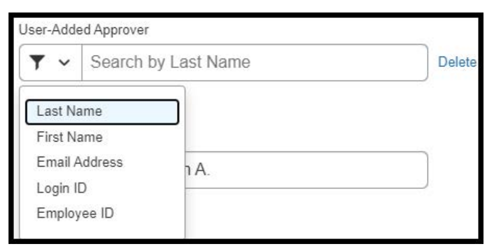
To add an approver **BEFORE** the listed Manager Approval

- Click the **+Add Step** above the listed approver



Adding an approver will add a ***User-Added Approver*** field

- **Click** on the filter to the left of the field
- **Select** how you wish to search for your approver
- Supported fields include: *Last Name, First Name, Email Address*
- Enter your parameters
- **Select** the person you wish to add to the **Approval Flow**, and click **Save**

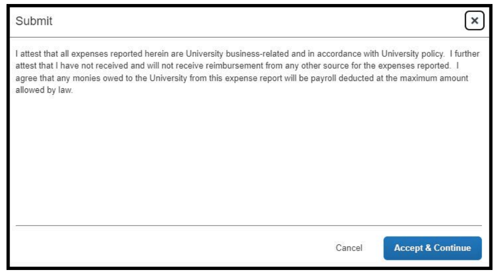


Submit the Expense Report

When you are ready to submit the report

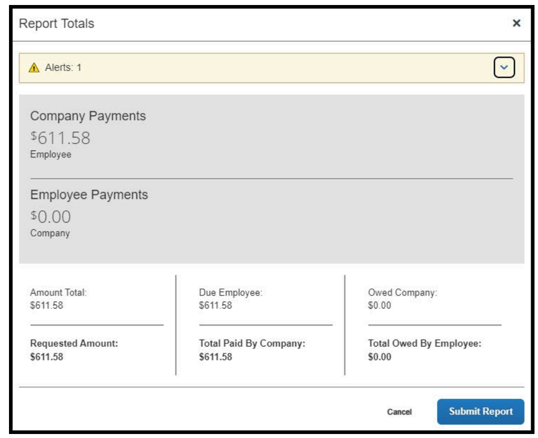
- ❖ **Click *Submit Report***

Several boxes will appear, and you will have to click through all of them to finish submitting your expense report



The **Submit** box will appear first

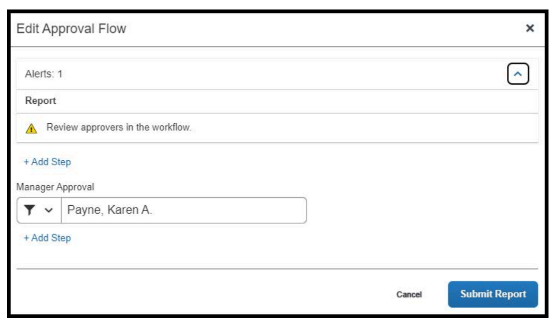
- ❖ This is an electronic signature, verifying that all expenses are appropriate



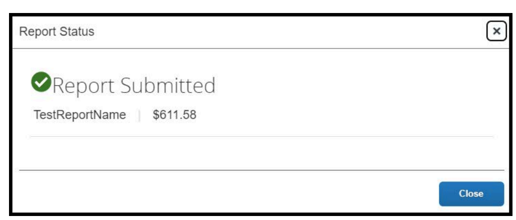
Next, the **Report Totals** box will appear, review the amounts and any alerts

- ❖ Yellow alerts are reminders and do not necessarily require additional action

Finally, you will have to confirm the **Approval Flow** (again)



The **Report Status** box will confirm that the report was submitted



Remember to Log Off

Log out of **Concur**
Log out of **Wolverine Access**, and
Log out **again** to **un-authenticate** credentials from all University-enabled Web sites